Frequently Asked Questions

This Frequently Asked Questions guide is meant to assist users from the State of Arizona and cooperative purchasing organizations.

Logging In

1. **What if I cannot login to ProcureAZ?**

   If you have not been given a login ID and temporary password, you do not have an account. User accounts must be setup by an administrator from your Organization. Organizations in ProcureAZ include state agencies, cities, counties, school districts and other members of the State's purchasing cooperative. If you do not believe that your Organization has been setup, or you do not know who your administrators are, please contact procure@azdoa.gov. Otherwise, contact an administrator from your Organization to request an account.

   NOTE: State agency users must have taken the appropriate training in order to receive an account.

2. **What if I cannot remember my password?**

   If you have been given a login ID and password, and you are still not able to login, then you are likely mistyping your password. If so, you will see a link enabling you to answer your Login Question. Successfully answering your Login Question will trigger an email to the email address associated with your account in ProcureAZ that includes your password. If you cannot answer your Login Question correctly, contact an administrator from your Organization to reset your password.

3. **What is a Login Question and how do I set one?**

   A Login Question is a question that you setup for ProcureAZ to ask you when you forget your password. You also must provide the correct answer to the Login Question. Upon providing the answer to your Login Question, your password will be emailed to the email address associated with your account in ProcureAZ.

   You can setup your Login Question and Answer by clicking the **My Account** link in the top-left of the screen upon logging in. It is recommended that you setup a Login Question and Answer the very first time you login.

Roles

1. **Why can't I create a Requisition? Why can't I approve a document? Why can't I see administrative screens?**

   The functions you can view and access are dependent upon what roles you have been assigned, and what role you currently have selected. Once you login, each role that you have been assigned appears as a tab in the top-right of the screen. Ensure that you have selected the role that has rights to the functions you want to utilize.

   NOTE: If you have been assigned only one role, then no tabs will appear along the top-right. You are always automatically in that role while you are logged in to ProcureAZ.

2. **What roles have access to which functions?**

   Each role automatically has rights to certain functions, but may also permit other functions to be assigned to a specific user. Generally, Basic Purchasing users can create, modify and approve all documents; Department Access users can be given the ability to create Requisitions, approve, and/or receive; Inquiry users can view any document, but not create or modify any document; and administrative users can add or modify approval paths, users, department/locations, etc.

Ordering

1. **How do I create a Requisition for on-contract items?**

   On-contract Requisitions are referred to in ProcureAZ as "Releases" or "Release Requisitions." In order to create a Requisition for items on-contract, create a new Requisition and select "Release" in the **Requisition Type** field on the General tab of the Requisition.

On-contract items are added to a Requisition by selecting **Search Items** on the Items tab of the Requisition. This enables you to search for a specific contract or contract item, and to copy a desired quantity of the item to your Requisition.

2. **What if the items on a contract are not setup properly (e.g. incorrect item descriptions, pricing, etc.)?**
   The Buyer at the agency who manages the contract can create a change order to resolve any issues with the contract items or setup. Contact the buyer or the CPO of that agency for assistance with their contract.

3. **What if I can't find items from a particular contract when I'm searching for contract items on a Release Requisition?**
   One common reason for this is that the Blanket Controls on the contract may not be set up to allow your particular Organization, Department or Location to order from this contract. When searching for items, use as few criteria as possible to locate the contract items in question. If after initial searches you are unable to find the items in question, contact the buyer to determine whether Blanket Controls need to be changed to enable you to order from this contract. If changes are required, the buyer who manages that contract can create a Change Order against that contract to change Blanket Controls, per #6 in the Contracting section, below.
4. **How do I create a Requisition for off-contract items?**
   Off-contract Requisitions are referred to in ProcureAZ as "Open Market Requisitions." In order to create a Requisition for items off-contract, create a new Requisition and select "Open Market" in the **Requisition Type** field on the General tab of the Requisition.

   Off-contract items are added to a Requisition from the Items tab either by selecting **Add Open Market Item**, then completing and saving the screen that appears, or by clicking **Search Items** and searching for previously ordered items to copy to your Requisition.

5. **Why does my on-contract item have an "Enter Info" link in the Unit Price field on the Items tab?**
   If you add an on-contract item that was not assigned a unit price by the contract officer, then you will have to provide the price for the item on your Requisition. Generally, on-contract items are given no unit price if the price of the item is variable and the State gets a standard discount, if the contract is setup for users to call the vendor to get quotes, or there are so many items provided under the contract that the list is maintained in separate price sheet or catalog. Items intended for use when setting up blanket encumbrances against a contract will also not be given a unit price.

   Click the **Enter Info** link and you will be taken to a screen describing the item in detail. On this screen, you will need to provide a **Catalog/Unit Price**, as well as a **Price Reference #**. Depending upon what you are ordering, you may also want to replace the **Description** for the item in order to better describe what it is you are attempting to order. Once completed, click **Save & Exit** to return to the Items tab of your Requisition.

6. **How do I request a specific Reseller or Distributor when placing an on-contract Requisition?**
   You will need to let the contractor know which Reseller or Distributor you wish to use by documenting this on the Requisition. One method for documenting this is to add an attachment providing this information. Another method is to add this information to the line-item descriptions. On the Items tab of your Requisition, select the **Item #** link next to the Item(s) you would like to provide this information for, type it into the **Description** field, and click **Save & Exit**.

7. **Why do I still see an address error even though I've selected and saved my ship-to and/or bill address(es)?**
   If you need to apply the same ship-to and bill-to address to all of the items on your Requisition or Purchase Order (PO) and you change either address from your default, after saving on the Address tab you must also select the **Apply Ship-to to All Items** and/or **Apply Bill-to to All Items** button as the final step.

8. **Why does the bill-to and/or ship-to address I selected on the Address tab not display on the Summary tab?**
   If you need to apply the same ship-to and bill-to address to all of the items on your Requisition or PO, once you have selected and saved an address on the Address tab, you must also select **Apply Ship-to to All Items** if you changed the Ship-to or **Apply Bill-to to All Items** if you changed the Bill-to.

9. **Why do I still see an accounting error even though I've entered and saved my funding source(s)?**
   If you need to apply your funding source(s) to all items on your Requisition or PO, you must select the **Rebuild for All Items** button on the Accounting tab as the final step after saving.

10. **Why does the funding source I selected on the Accounting tab not display on the Summary tab?**
    If you need to apply the same funding source(s) to all of the items on your Requisition or PO, once you have entered and saved your funding source(s) on the Accounting tab, you must also select **Rebuild for All Items** as the final step.

Contracting

1. **Why are contracts referred to as POs?**
   In ProcureAZ, any agreement with a vendor to provide goods/services is referred to as a PO. The **PO Type** determines whether the agreement is a term contact, a purchase against a term contract, or an off-contract purchase.

2. **Why is the "PO Type" for contracts set to "Blanket?" Why not "Contract?"**
   In ProcureAZ, a Contract PO requires that each item on the contract be associated with an 11-digit NIGP Commodity/Service Code. Blanket or Master Blanket POs only require a 5-digit NIGP Code for each item. Most State agencies will only use the 5-digit code, therefore your contracts should be set to a **PO Type** of "Blanket."

3. **What does the "Receipt Method" indicate?**
   Receipt Method refers to how the items on the contract will be received once ordered. Select "Quantity" if receivers should indicate that they received a set quantity of the unit of measure chosen for the item(s). For instance, if the item(s) will be received by the crate, box, hour, package, etc. Generally, commodities are set to a **Receipt Method** of "Quantity."

   Select "Dollar" if receivers should indicate that they received a certain dollar amount worth of the item(s). Generally, services are set to a **Receipt Method** of "Dollar," particularly if there is no set hourly rate so the services cannot be received by the number of hours worked. Items to be used when setting up blanket encumbrances should also be set to a "Dollar" **Receipt Method**.

4. **What does the "Release Type" indicate?**
   Release Type refers to how orders against the contract (Releases) will be processed. "Direct" Releases do not route through procurement following approval. The end-user that created the Requisition is able to send it directly to the vendor. "Standard" Releases are sent to procurement following approval to send to the vendor.

   Unless it is necessary for procurement to check each order against a certain contract, it is recommended that the **Release Type** be set to "Direct."

5. **What are vendor distributors and why am I seeing a red error about them?**
   Distributors in ProcureAZ are the vendors authorized to receive orders against a contract. Generally, this will just be the prime contractor; however some contractors may allow other authorized resellers to receive orders. When establishing a contract, ProcureAZ requires that you select the Distributors tab under the Vendor tab and specifically indentify the Distributors. If the prime contractor is the only Distributor, simply select the **Include Primary Vendor in Vendor Distributor List** check box and click **Save & Continue** on this tab.

6. **Where do I designate who can order off of a contract in ProcureAZ?**
   On the Control tab of the contract (Master Blanket PO), you can select which entities can order off of the contract in the **Organization** and **Department** columns. For single-agency contracts, your agency will automatically appear in the **Organization** column, and you will just need to select the Department(s) that can order off of the contract. If all Departments from your agency can order from the contract, select **AGY-Agency Umbrella Master Control** as the Department.

For multi-agency and statewide contracts, you will first need to select the **Cooperative Purchasing Allowed** check box. This will enable you to select other agencies in the **Organization** column. For statewide contracts, select **ALL ORG-Organization Umbrella Master Control** as the Organization.

7. **For contracts with a yearly dollar spending limit (e.g. cost reimbursement contracts), how do we establish this limit in ProcureAZ?**

   On the Control tab of the contract (Master Blanket PO), there is a **Dollar Limit** field that can be completed for each Organization that is setup to order off of the contract. Input the **Dollar Limit** that applies and select **Save & Continue** on this tab to set the limit.

   If the contract is extended, or the limit needs to be changed, you can amend the **Dollar Limit** by creating a Change Order against the Master Blanket PO in ProcureAZ.

Error Messages

1. **What do I do if I receive an error when attempting to approve a Requisition?**

   Errors received when attempting to approve a Requisition are virtually always triggered by AFIS due to either an accounting issue or AFIS being unavailable. Only the last approver of the Requisition will see these. Please refer to the AFIS Error Message Guide at http://www.spo.az.gov/ProcureAZ/Application_Basics/default.asp to determine the type of error. If it is related to accounting, you will either need to select the Accounting tab of the Requisition and fix the funding source(s) provided, or disapprove the document, which will send it back to the creator to fix and re-submit for approval.

   If the error received when attempting to approve a Requisition is related to AFIS being unavailable, if it is during normal business hours, you will want to contact your agency's AFIS liaison for assistance. If it is outside normal business hours, you will need to wait until business hours to approve the Requisition.

2. **What do I do if I receive an error when attempting to send a PO?**

   Errors received when attempting to send a PO could be related to number of factors, including: inaccurate or depleted funding sources, AFIS being unavailable, or incomplete or inaccurate information in the vendor's profile. Please refer to the AFIS Error Message Guide at http://www.spo.az.gov/ProcureAZ/Application_Basics/default.asp to determine the type of error.

   Generally, accounting errors must be fixed by creating a Change Order to edit the funding source(s) provided, and errors related to AFIS being unavailable or vendor profile information must be fixed by either your AFIS liaison, GAO personnel, or the vendor.

   - If Terms and Conditions are missing from the vendor's profile or if you receive a message about an Invalid Employee ID (and the vendor is not a State Employee), contact the vendor to complete the Terms and Categories section of their Vendor Profile and select the correct Entity Type.
   - Contact your AFIS liaison for guidance for accounting-related errors
   - Contact the GAO Vendor Group at vendors@azdoa.gov for issues related to Vendor Names, Tax IDs (TIN) or Foreign Vendor related messages.